

WEST 1.0

[Help](#)[Main Menu](#)[Search Form](#)[Posting Counts](#)[Show WS Numbers](#)[Edit WS Numbers](#)

Search Results - 0

Term	Documents
((stochastic ADJ market ADJ factor\$) AND portfolio\$)	0

Database: **Derwent**

Refine Search:

(stochastic ADJ market ADJ factor\$) AND portfolio\$

Search History

<u>DB Name</u>	<u>Query</u>	<u>Hit Count</u>	<u>Set Name</u>
DWPI	cumulative NEAR3 (distribution ADJ function)	17	<u>L1</u>
DWPI	(cumulative NEAR3 (distribution ADJ function\$)) AND portfolio\$	0	<u>L2</u>
DWPI	(low ADJ discrepancy ADJ deterministic ADJ sequence\$) AND portfolio\$	0	<u>L3</u>
DWPI	(stochastic ADJ market ADJ factor\$) AND portfolio\$	0	<u>L4</u>

5/10/99

SMD

Your recent searches

This is a list of your 11 most recent searches this session.

Click an item in the **Search** column to view its search results, or go back to [Search by Word](#).

Search	Articles found
(cumulative PRE/1 distribution PRE/1 function) AND portfolio AND stochastic	9
(cumulative PRE/1 distribution PRE/1 function) AND portfolio AND stochastic	5
(cumulative PRE/1 distribution PRE/1 function)	50
(cumulative PRE/1 distribution PRE/1 function)	25
(AUTHOR(traub) OR AUTHOR(paskov) OR AUTHOR(vanderhoof) OR AUTHOR(papageorgiuo)) AND portfolio?	1
(AUTHOR(traub) OR AUTHOR(paskov) OR AUTHOR(vanderhoof) OR AUTHOR(papageorgiuo)) AND portfolio?	4
AUTHOR(traub) OR AUTHOR(paskov) OR AUTHOR(vanderhoof) OR AUTHOR(papageorgiuo)	50
AUTHOR(traub) OR AUTHOR(paskov) OR AUTHOR(vanderhoof) OR AUTHOR(papageorgiuo)	50
stochastic AND portfolio AND (distribution PRE/1 function) AND (low PRE/1 discrepancy PRE/1 deterministic PRE/1 sequence)	0
stochastic AND portfolio AND (distribution PRE/1 function) AND (low PRE/1 discrepancy PRE/1 deterministic PRE/1 sequence)	0
stochastic AND portfolio AND (distribution PRE/1 function)	12

(FILE 'USPAT' ENTERED AT 14:00:51 ON 10 MAY 1999)

L1	23 S	LOAN? (P) PORTFOLIO?
L2	6 S	L1 AND HORIZON?
L3	0 S	PORTFOLIO? AND LOAN? AND HORIZON? AND DISTRIBUTION() FUNC
L4	6 S	PORTFOLIO? AND LOAN? AND CORRELATION?
L5	6 S	L4 NOT L2
L6	24 S	AREA? (BN) (DISTRIBUTION() FUNCTION?)
L7	0 S	L6 AND (LOAN OR PORTFOLIO?)
L8	0 S	POTENTIAL-LOSS-FUNCTION? AND PORTFOLIO?
L9	1 S	POTENTIAL-LOSS-FUNCTION?
L10	104 S	CUMULATIVE-DISTRIBUTION-FUNCTION?
L11	0 S	L10 AND PORTFOLIO?
L12	6 S	LOW-DISCREPANCY
L13	0 S	LOW-DISCREPANCY-DETERMINISTIC-SEQUENCE?
L14	9 S	VALUE-AT-RISK AND PORTFOLIO?
L15	0 S	L14 AND LOSS-FUNCTION?

Dialog 5/10/99

? b411

```
10may99 16:34:18 User242928 Session D33.2
      $0.00      0.041 DialUnits File410
$0.00 Estimated cost File410
      FTSNET      0.002 Hrs.
$0.00 Estimated cost this search
$0.00 Estimated total session cost      0.154 DialUnits
File 411:DIALINDEX(R)
```

DIALINDEX(R)

(c) 1999 The Dialog Corporation plc

```
*** DIALINDEX search results display in an abbreviated ***
*** format unless you enter the SET DETAIL ON command. ***
? sf mathsci
```

```
>>>"MATHSCI" is not a valid Dialindex category
>>>No valid files specified
? b mathsci
```

```
>>>"MATHSCI" is not a valid category or service name
>>>No valid files specified
```

DIALINDEX(R)

(c) 1999 The Dialog Corporation plc

```
*** DIALINDEX search results display in an abbreviated ***
*** format unless you enter the SET DETAIL ON command. ***
? b 411
```

```
10may99 16:35:10 User242928 Session D33.3
      $0.18      0.143 DialUnits File411
$0.18 Estimated cost File411
      FTSNET      0.014 Hrs.
$0.18 Estimated cost this search
$0.18 Estimated total session cost      0.297 DialUnits
File 411:DIALINDEX(R)
```

DIALINDEX(R)

(c) 1999 The Dialog Corporation plc

```
*** DIALINDEX search results display in an abbreviated ***
*** format unless you enter the SET DETAIL ON command. ***
? sf allbus
```

```
You have 342 files in your file list.
(To see banners, use SHOW FILES command)
? s (au=traub or au=paskov or au=vanderhoof or au=papageorgiou) and portfolio?
```

Your SELECT statement is:

```
s (au=traub or au=paskov or au=vanderhoof or au=papageorgiou) and
portfolio?
```

```
      Items      File
      -----
Examined 50 files
```

SMD

1 26 Finance & Banking Newsletters 1999/May 07
Examined 100 files
Examined 150 files
Examined 200 files
Examined 250 files
Examined 300 files

1 file has one or more items; file list includes 342 files.
One or more terms were invalid in 162 files.

? b 267

10may99 16:41:00 User242928 Session D33.4
\$4.42 3.533 DialUnits File411
\$4.42 Estimated cost File411
FTSNET 0.100 Hrs.
\$4.42 Estimated cost this search
\$4.60 Estimated total session cost 3.830 DialUnits

File 267:Finance & Banking Newsletters 1999/May 07
(c) 1999 The Dialog Corp.

Set	Items	Description
---	-----	-----

? s (au=traub or au=paskov or au=vanderhoof or au=papageorgiou) and portfolio?

	1	AU=TRAUB
	0	AU=PASKOV
	0	AU=VANDERHOOF
	0	AU=PAPAGEORGIOU
	5844	PORTFOLIO?
S1	1	(AU=TRAUB OR AU=PASKOV OR AU=VANDERHOOF OR AU=PAPAGEORGIOU) AND PORTFOLIO?

? t 1/3,k/1

1/3,K/1
DIALOG(R)File 267:Finance & Banking Newsletters
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04542897

The Art Of Tax Management: By considering the tax implications of owning mutual funds, you will more effectively manage your clients' investments.

Daniel J. Traub

Financial Planning

December 1,1998 DOCUMENT TYPE: NEWSLETTER

PUBLISHER: SECURITIES DATA PUBLISHING

LANGUAGE: ENGLISH

WORD COUNT: 1841

RECORD TYPE: FULLTEXT

(c) SECURITIES DATA PUBLISHING All Rts. Reserv.

Daniel J. Traub

...years. Over that time, this fund has grown to become a larger percentage of their **portfolio** than is prudent. The capital gains and resulting taxes the client would owe upon a sale make you reluctant to reposition the **portfolio**. If you do nothing, the problem will likely become even more extreme over time. What...

TEXT:

...years. Over that time, this fund has grown to become a larger percentage of their **portfolio** than is prudent. The capital gains and resulting taxes the client would owe upon a sale make you reluctant to reposition the **portfolio**. If you do nothing, the problem will likely become even more extreme over time. What...reinvest it, and there is certainly no

requirement to do so

Reinvesting distributions for a **portfolio** holding that is already too large will only compound the problem. Simply inform the mutual...

...the lowest cost-basis shares of a fund that is overweighted will help solve the **portfolio** dilemma as well.

You should be aware of a few intricacies regarding the gifting of...

...Offset winners with losers. Perhaps the most common technique for the tax management of a **portfolio**, either stocks or mutual funds, is to sell a losing position in order to offset...sale.)

Now, here are some considerations for funds you may want to add to a **portfolio**. Whereas the above discusses how to deal with a fund if it is already part of a **portfolio**, the following are factors you should consider for additions to a **portfolio**. Although tax considerations will not yield any advice on what type of fund to purchase...

...funds need only distribute realized gains (as opposed to unrealized gains).

If a fund has **portfolio** turnover of 100%, then the average holding period for each investment is one year. A...

...turnover has a two-year average holding period, and so on. Funds with a higher **portfolio** turnover will usually, but not always, have year-end distributions that are higher than funds with lower **portfolio** turnover. In addition, high-turnover funds are more likely to distribute more in the form...

...nothing about the likelihood of those gains being realized.

Any fund that has historically low **portfolio** turnover, and whose turnover is expected to remain that way, should have no reason to...to minimize the tax consequences.) In essence, past tax efficiency may make an older, low **portfolio** turnover fund less attractive to potential new investors; only time will tell.

* Don't buy...

...your clients' taxes and increase their after-tax return while allowing you to rebalance their **portfolio** over time. Along the way, you will create clients who are more satisfied with the...

? b 411

```
10may99 16:41:38 User242928 Session D33.5
$1.06      0.193 DialUnits File267
$1.25  1 Type(s) in Format  3
$1.25  1 Types
$2.31  Estimated cost File267
      FTSNET    0.016 Hrs.
$2.31  Estimated cost this search
$6.91  Estimated total session cost    4.022 DialUnits
File 411:DIALINDEX(R)
```

DIALINDEX(R)

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*** DIALINDEX search results display in an abbreviated ***

*** format unless you enter the SET DETAIL ON command. ***

? sf allbus

You have 342 files in your file list.

(To see banners, use SHOW FILES command)

? s portfolio? and (cumulative (3n) (distribution()function?))

Your SELECT statement is:

s portfolio? and (cumulative (3n) (distribution()function?))

Items	File
-----	-----

1	7: Social SciSearch(R)_1972-1999/May W1
7	13: BAMP_1999/May W1

<-----User Break----->

u!

? s portfolio? and (cumulative (3n) (distribution()function?)) and stochastic? and (low()discrepancy()deterministic()sequence?)

Your SELECT statement is:

s portfolio? and (cumulative (3n) (distribution()function?)) and stochastic? and (low()discrepancy()deterministic()sequence?)

Items	File
-----	-----

Examined	50 files
Examined	100 files
Examined	150 files
Examined	200 files
Examined	250 files
Examined	300 files

No files have one or more items; file list includes 342 files.

? s portfolio? and (low()discrepancy()deterministic()sequence?)

Your SELECT statement is:

s portfolio? and (low()discrepancy()deterministic()sequence?)

Items	File
-----	-----

Examined	50 files
Examined	100 files
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Examined	200 files
Examined	250 files
Examined	300 files

No files have one or more items; file list includes 342 files.